

The local Capitas Support Team along with the national Private Wealth Centers can provide case consultation and planning options to enable financial advisors to enhance their practices by effectively integrating life insurance into the client's overall estate, business or financial plans.

Alabama & Mississippi



Kevin M. Lauer

**Team Leader - President and General Agent at Lauer & Associates, Inc.
Internal Account Executive/Case Designer**

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Bank of America Private Bank

Merrill Private Wealth Management

Supported by the Capitas Financial Team – Led By Local Director of Private Wealth

Director of
Private Wealth

Point of Sale
Support

Internal Account
Executive

Case
Designer

Case
Manager

Collaborating with the National Capitas Financial Private Wealth Centers

Wealth Transfer &
Estate Planning

Premium
Finance

Business Planning /
Succession

Executive
Planning



Kevin M. Lauer

President for Lauer & Associates, Inc.

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BUSINESS EXPERTISE

Wealth Transfer Planning
Retirement Planning

Executive Compensation Planning
Financial Products Analysis & Design

Business Continuation Planning

BIOGRAPHY

Kevin graduated from Auburn University in 1992 with a B.S. in Business Administration. He joined Lauer & Associates in 1994 and is involved in all aspects of the day-to-day operations of the agency.

Kevin is responsible for the recruitment of brokers in the independent channel and specializes in assisting brokers with advanced case and product design.

With 20 years' experience in the industry, he has developed advanced knowledge in underwriting allowing him to assist advisors in placing difficult cases. He is a Registered Representative holding his Series 6 and 63 licenses.

Kevin resides in Mountain Brook, Alabama with his wife Brooke and their twin sons, Nicholas and Ethan.

LAUER & ASSOCIATES, INC.

Lauer & Associates is a founding member of Capitas Financial, a premier life brokerage firm in the United States. Since 1987 the agency has been assisting independent agents, financial advisors and other planners in finding the best insurance solutions for their clientele.

Lauer & Associates provides a high level of wealth transfer, asset protection and tax advantaged strategies through active engagement with advisors and point of sale consultation. The agency has always focused on providing superior local service in delivering insurance products throughout the Southeast. By bringing decades of sales and underwriting knowledge to the table, along with access to all of the top carriers in the industry, we are able to provide optimal results for our producers.

CAPITAS FINANCIAL, INC.

Capitas Financial is the premier partner for Financial Advisors, providing insurance solutions for investment, tax, retirement, estate, business and financial life planning needs. Formed in 2001, Capitas Financial was founded on the strength and reputation of its founding members and was created to establish strong and strategic alliances with leading insurance carriers and financial institutions.

Securities offered through: The Leaders Group, Inc. member FINRA / SIPC 26 W. Dry Creek Circle, Ste. 800 Littleton, CO 80120 (303) 797-9080.